



Section E. Loansome Doc Patrons

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Section E-1. Search for LD Patrons at My Institution

DOCLINE libraries that provide Loansome Doc services to their patrons may click on the “Loansome Doc Patrons” tab from the DOCLINE main menu to search for patron records at their institution.

As a participant in the Loansome Doc (LD) program, each library may only search for patrons who have registered with their library. Only NLM has the ability to view all registered Loansome Doc patrons.

The Loansome Doc Patrons search screen has **search** fields and **display** fields:

- Use the **search fields** to retrieve Loansome Doc Patron records.
- Use **display fields** to display the records in a specific format.
- The search screen provides two "Search in:" boxes and two "Only if:" boxes.

The screenshot shows the DOCLINE website in a Microsoft Internet Explorer browser window. The address bar shows the URL <http://docline.gov/docline/login.cfm>. The DOCLINE logo is at the top left, and navigation links (Home, Requests, Serial Holdings, Institutions, Loansome Doc Patrons) are at the top right. The "Loansome Doc Patrons" section contains the following search and display options:

- Search in:** A dropdown menu with options: Patron UserID, Address line 1, Address line 2, Area Code (telephone), City, Country code, First Name, Last Name, Patron UserID (selected), State/Province code, Zip/Mail code. To the right is a "Contains" dropdown and an input field.
- Only if:** A dropdown menu with options: Patron UserID, State/Province code, Zip/Mail code. To the right is an "AND" dropdown.
- Display results as:** A dropdown menu with the option: Patron list.
- In order to:** A dropdown menu with the option: View or Update records.
- Sort order:** A dropdown menu with the option: Last Name.
- Records per page:** A dropdown menu with the option: 25.

At the bottom of the search area are "Search" and "Reset" buttons.

Section E-1. Search for LD Patrons at My Institution

The down arrow in the **Search in:** box to select from the following list of fields:

- Address line 1
- Address line 2
- Area Code (telephone)
- City
- Country Code
- First name/Last name
- LIBID
- Patron User ID
- State/Province Code/Zip/Mail code

To further narrow a search, use one or both "**Only if:**" boxes, which include the following fields:

- Search all - (default)
- Affiliated - (LD patrons affiliated with the Ordering library)
- Authorized - (LD patrons authorized to use Ordering library)
- Forward to DOCLINE - (LD user authorizes Ordering library to forward request to DOCLINE)

The Loansome Doc Patrons search results screen displays the results of the search with a count of the records retrieved in a pre-defined format:

- Records may be displayed in one of **three possible formats**.
- Records in any display may be **sorted** by one of eleven possible fields.
- The default display is **Patron List**; the default sort is **Last name**.

102 results

Last Name	First Name	UserID	Affiliated	Authorized
Afeyan	Noubat	NAFEYAN	Yes	Yes
Ames	Marc	EANDA	Yes	Yes
Anestam	Sarah	SANESTAM	Yes	Yes
Ann, Charest	Sherrie Brougham, or	MOREY	Yes	Yes
Barry	Patrick	PBARRY	Yes	Yes
Blackmer	Nicholas	BETE	Yes	Yes
Blackmer	Nicholas	CBCCO	Yes	Yes
Blough	Rebecca	RBLGUSH	Yes	Yes
Buma	Shelley	SHELUMA	Yes	Yes
Carreau	Melissa	RADEWG	Yes	Yes
Chun Kung	Instrumentation Lab	IL R&D	Yes	Yes
Chun Kung	Instrumentation Lab	KEVIN	Yes	Yes
Chun Kung	Instrumentation Lab	ANDREW2	Yes	Yes
CLARK	GEORGE	GCLARK1024	Yes	Yes
Comisky	Daniel	TYMPSTAR	Yes	Yes
Comptello	Rick	COMPETIE	Yes	Yes
Condakes	Nicholas	CONDAKES	Yes	Yes
Connors	Susan	SLEEC	Yes	Yes
Cormier	James	ECIBIOTECH	Yes	Yes
Corniveau	Kathleen	KATE	Yes	Yes
Cotter	Daniel	COTTER	Yes	Yes
Cramton	Stephen	CROSSLAND	Yes	Yes
Cramton	Stephen	NEE3	Yes	Yes
Cutler	Jeanne	AEC	Yes	Yes
Cyr	Rosa	ROSECYR	Yes	Yes

Section E-1. Search for LD Patrons at My Institution

A full patron record may be displayed by clicking on any one of the fields displayed in patron display.

The full patron record screen is labeled: **Update Patron Information**.

A full patron record includes the items listed below.

- Name and address (as the user entered it during LD registration)
- Phone
- Fax
- Email
- Delivery Method
- Forwarding
- Comment
- Affiliated Patron (library may update)
- Authorized Patron (library may update)



Note:

- Only those fields noted as “(library may update)” can be altered by the ordering library.

Section E-2. Loansome Doc Patron Categories

Affiliated Patron: A patron who has an affiliation with the library or organization that is providing the Loansome Doc service (e.g. the hospital staff ~~or~~ physicians with hospital privileges.)

The default setting is "Affiliated".

- If checked, "Affiliated" will appear on the Loansome Doc receipt.
- If not checked, "Unaffiliated" will appear on the Loansome Doc receipt.

Authorized Patron: Indicates that the patron is approved for Loansome Doc services at the specific institution. Each library has the ability to designate whether or not individual Loansome Doc users are authorized to route their requests to their institution.

- The default setting is "Authorized".
- If a library no longer wants to serve a patron, they should contact that person by telephone, email or in writing.
- Select the affiliated box on the Loansome Doc Patron screen to remove the check mark.
- Unauthorized users will not be able to make Loansome Doc requests to your library.



Note:

One or both categories may be selected as appropriate.

Section E-3. Update a Patron's Record

- The Patron record is separated into two parts: **Display Only** and **Update**.
- The Loansome Doc library can **update** only the **Affiliated** and **Authorized** fields. Click **Update** at the bottom of the screen to save changes.
- Each patron is responsible for updating their own registration information from the “Loansome Doc Registration” Page in PubMed.
- To return to the Loansome Doc Patrons search results screen without making changes, click **Search Results** from the bottom of the “Update Patron Information” screen.
- The following display options are available to view Loansome Doc patron records:
 1. **Patron list - (default display)** This display is a list of patron records which meet the search criteria entered in the “Loansome Doc Patrons Search” screen. The Patron List display includes the following fields:
 - Last Name - First Name |
 - UserID
 - Affiliated
 - Authorized
 2. **Contact Information** - This display includes:
 - Patron Name
 - Phone
 - Fax
 - Email
 3. **Patron Address** - This display includes:
 - Patron Name
 - Patron Address
- From any display, patron records may be sorted by any one of the following fields:
 - Address line 1
 - Address line 2
 - Area Code (telephone)
 - City
 - Country Code
 - First name
 - Last name
 - LIBID
 - Patron User ID
 - State/Province Code
 - Zip/Mail code

Section E-4. Loansome Doc Passwords

Select the **PASSWORD** button at the bottom of the **Update Patron Information** screen to display the Loansome Doc patron's password: "And the answer is {PatronPassword}".

Section E-5. Block a Patron's Loansome Doc Requests

Authorized Patron: Indicates that the patron is approved for Loansome Doc services at the specific institution. Each library has the ability to designate whether or not individual Loansome Doc users are authorized to route their requests to their institution. The default setting is authorized.

If a library no longer wants to serve a patron, they should contact that person by telephone, by e-mail, or in writing. Select the affiliated box on the Loansome Doc Patron screen to remove the check mark.

Unauthorized users will not be able to make Loansome Doc requests to your library.



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